WalkMe Support

Brief Overview

Our dedicated WalkMe Support team is always ready to assist with any technical questions or troubleshooting related to the WalkMe product. Support cases are managed through an efficient, user friendly ticketing system located in the WalkMe World Community.

Before creating a technical support case, we suggest exploring our amazing WalkMe World Community, and checking out resources like the Troubleshooting section in the Help Center.

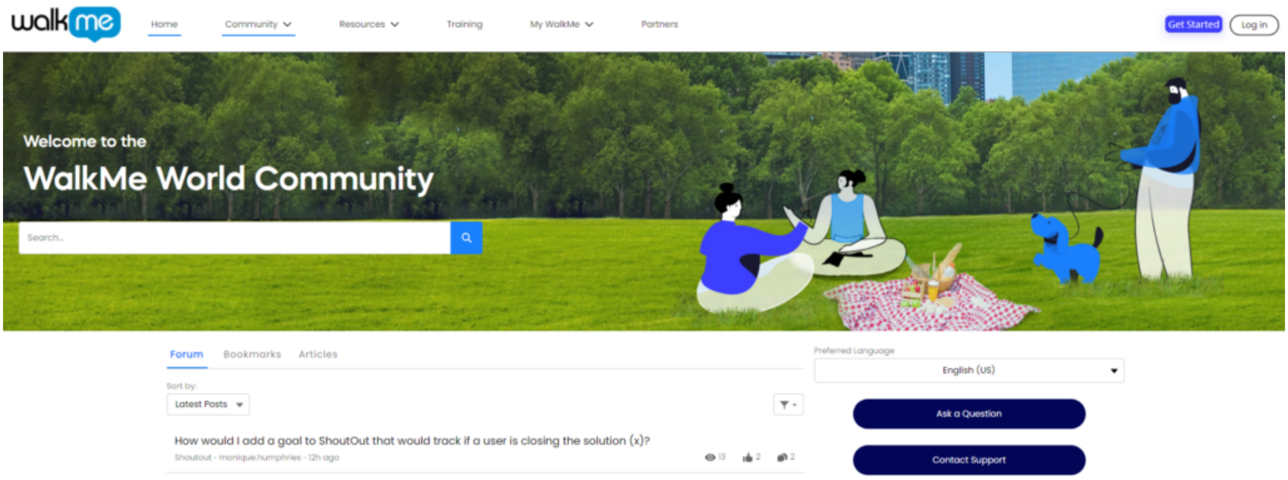
We also highly recommend using the Flow Tracker tool for troubleshooting. It's a valuable aid designed to assist you in managing and resolving technical issues more effectively.

Creating Cases

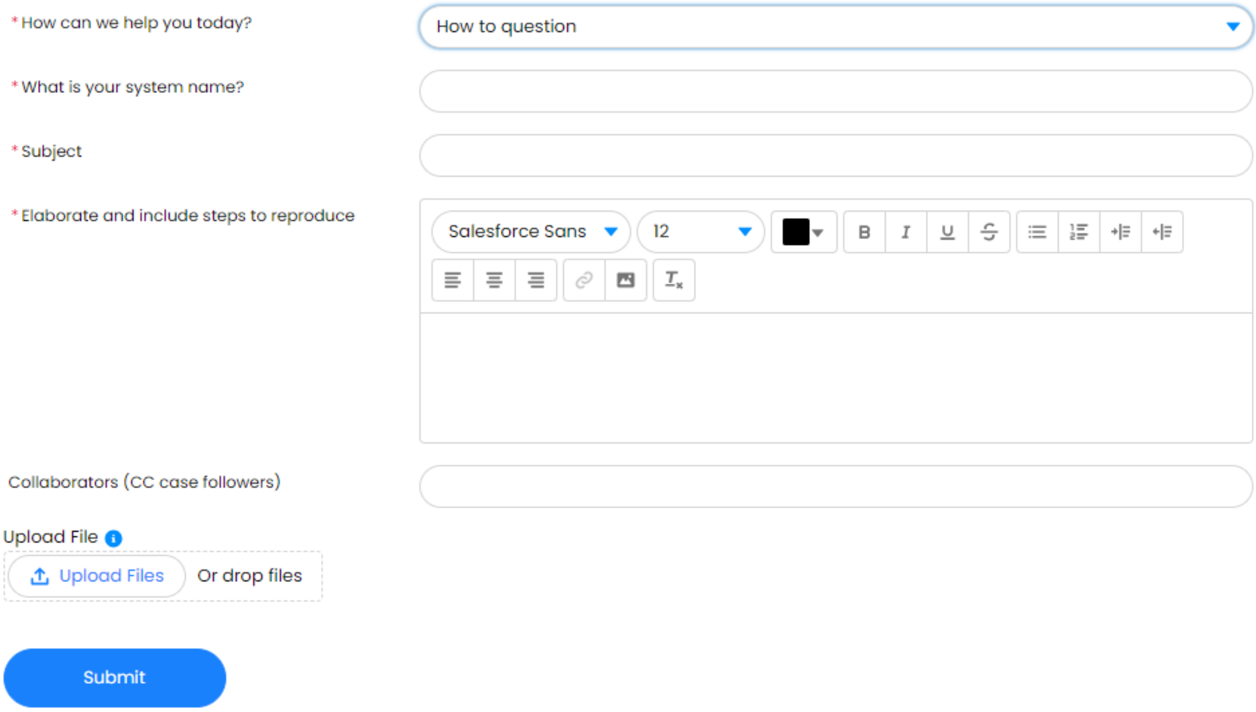
You can contact WalkMe Support by creating a case in the Community portal, chat, or in some cases, using WalkMe Assistant.

Create a Case in the WalkMe World Community

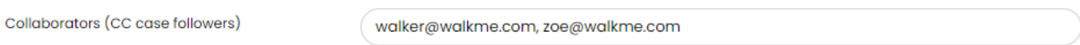
1. Log in to the WalkMe World Community
2. Select **Contact Support** on the home page



3. Fill in the Contact Support form
   - **Tip**: **See our recommendations for best practices below**



4. Add collaborators (optional)
    - Adding collaborators lets additional people help your case or receive case updates. Whoever you add will see case communications and be able to interact directly with the Support Engineer if necessary.
    - **To add a collaborator:**
        1. In the **Collaborators (CC case followers)** field, type the email address of whoever you'd like to add as a collaborator
        2. To add multiple collaborators, separate each email address with a comma **,**



5. Attach a screenshot or file (recommended)
    - **Note**: File size cannot exceed 20 mb. Executable and DLL files are not supported.
6. Click **Submit**
7. You will see a notification that your case was submitted successfully

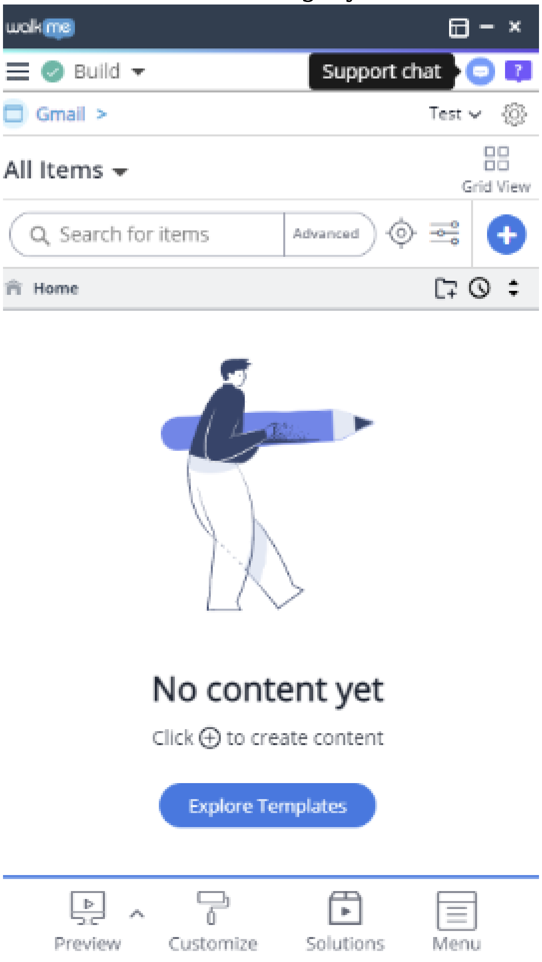
Once you submit a case, a case ID is assigned and you can track the case progress inside the ticket portal. All responses are updated to the case, and are also sent by email. **See Managing and Tracking Cases.**

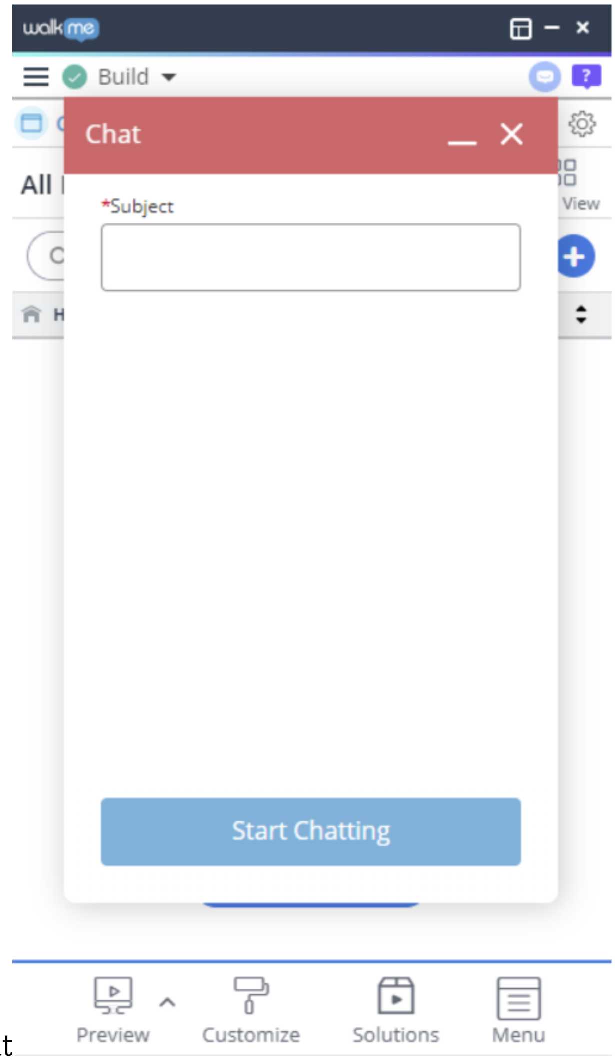
Create a Case from Chat

Sometimes you have a quick question, would like a quick update, or you simply prefer chat as your communication option. Either way, we have you covered.

Chat from the WalkMe Editor

1. Log in to the Editor and click the **Support Chat Button**
   - **Note**: If the Button is grey that means no agents are available at this time.





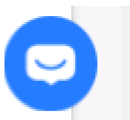
2. Fill out the subject of your chat
3. Click **Start Chatting** and you will be connected to an agent

Chat from [WalkMe Insights]

Currently unavailable for WalkMe Insights

The live chat feature is unavailable in Insights due to a technical challenge that is taking longer than expected to resolve. However, our team is actively working on the issue to restore the feature as soon as possible.

1. Log in to [WalkMe Insights]



2. Locate the chat button in the bottom right corner of the page
3. Enter the subject

4. You will then be connected to an agent

Note: Chat functionality is only available to paying customers

To access chat the below domains must be allowlisted:

- salesforceliveagent.com
- walkme.my.salesforce.com
- walkme.my.site.com

Create a Ticket from WalkMe Assistant

WalkMe Assistant helps builders when they encounter WalkMe items that aren't behaving as intended by helping to resolve the issue on the spot, or by submitting a report directly from within the Editor. It's recommended to use WalkMe Assistant when possible as it shortens time to resolution by automatically creating information about the item.

Once a ticket has been created using WalkMe Assistant, you can track your tickets in the Activity Board.

Not all WalkMe Assistant tickets are routed to WalkMe Support but if a support case was opened, the case will also be added to the WalkMe World Support Ticket Portal.

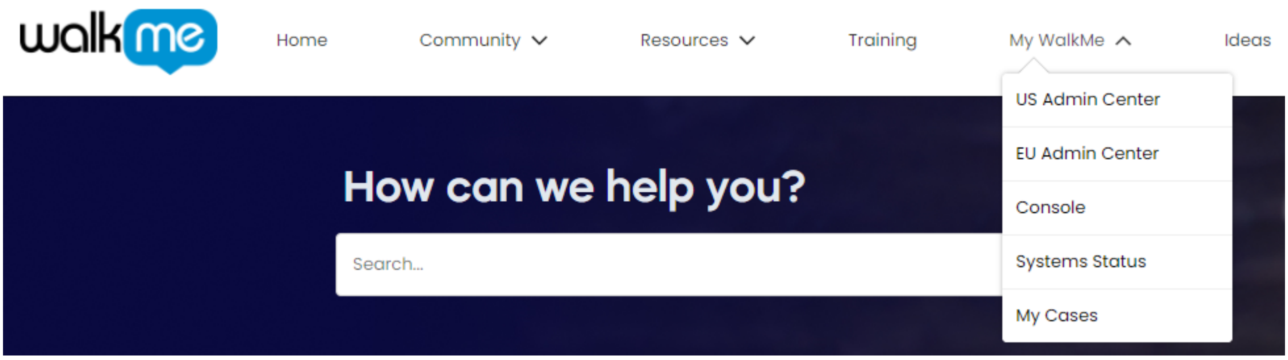
Learn more: **WalkMe Assistant**

Managing and Tracking Cases

View Existing Open and Closed Cases

To view and track your open and closed cases:

1. Log in to the **WalkMe World Community**
2. Go to **My WalkMe** → **My Cases**



- The My Open Cases tab provides details about your ongoing cases
- Once your case is resolved, you are able to view the case history and resolution details under the Resolved Cases tab

Note: You can reopen a closed case within 15 days from the closure date. After that time, a new ticket should be created. You can reference the old case ID in the new ticket to provide additional context. To reopen a case, respond to the case.

View Cases Across Your Team

In the **My Team Cases** tab, you can view all of the cases associated with your account, even if you didn't create the ticket.

To enable this functionality, please reach out to your Customer Success Manager or WalkMe contact and request access.

Best Practices When Creating Cases

The “Elaborate and provide steps to reproduce” field in the Contact Support form is your opportunity to add additional context and insight so that your Support Engineer can start investigating right away.

We recommend following this template by including the following information to speed up investigation:

- High level overview of the challenge
- Name or ID of the impacted WalkMe item
- Step names for Smart Walk-Thru issues
- Steps to reproduce the issue (step-by-step instructions please)
- Screenshots, videos, or files – These are helpful even if we don’t have site access, as this can help us prepare for a screen share call
- How have you troubleshooted so far?
- When did it last work?
- Site credentials, if possible
- Is the issue in production or test environment?
- Your time zone or preferred working hours
- Any other important information that may help us

Note:

- No detail is too small! Please add as much information as you can.
- You must be logged in to the Community to create or manage a case.

Priority Levels

Priority Level	Description

P1	**Critical:** A main System functionality is inoperable such that critical business processes are paralyzed and no workaround exists. This applies to a production environment and indicates that the system is not loading or causing harm to the Customer's application or a system component is crashing repeatedly.
P2	**Serious:** System is operative but degraded causing a significant impact on the business operation, or you are in jeopardy of missing business deadlines
P3	**Tolerable:** The System is usable, non-critical functionality or components are affected and the issue does not represent a significant impact on operations.
P4	**Questions:** Includes general questions, requests for documentation, or other non-critical system related issues. Operations are not affected.

Disclaimer: Unless otherwise specified in your contract, the above priority descriptions apply to your agreement in correlation to the Support Level listed. The version of the Service Level Agreement (SLA) that was effective at the time of your agreement will continue to be upheld throughout the entire duration of the contract period, irrespective of any subsequent releases of new SLA versions.

Frequently Asked Questions

Should I provide my IT team with a list of access requirements to work with WalkMe Support?

Yes, we recommend allowlisting the below domains specifically for Support:

Salesforce Chat:

- salesforceliveagent.com
- walkme.my.salesforce.com
- walkme.my.site.com

Schedule Once (to view screen share availability):

- go.wmesupport.com

View the full list of access requirements for WalkMe: **WalkMe Access Requirements**

When should I use WalkMe Support?

WalkMe Support will be able to assist you with technical issues and we'll also guide you in the right direction if you have "how to" questions.

For other topics, our team may directly connect you to a more relevant contact.

- For inquiries related to building out and designing content to align with strategic digital adoption goals, help with testing or requests for customization, our Professional Services team can gladly assist
- For inquiries related to training, please visit the **Digital Adoption Institute**
- For inquiries related to your contract and billing, please contact your Success team

I received a scheduling link but the availability doesn't work for me.

Please let the Support Engineer know and provide your range of availability. Our team will do our best to accommodate your request.

I think my agent might be located in a different timezone from me

Our team is distributed globally in order the provide you the fastest response. If you would like your ticket to be handled within a specific timezone, please let your agent know within the ticket.

How many issues are handled per case?

We aim to have each case be specific to a unique issue in order to maintain clear objectives and timelines.